



Strategic Planning When You Can't Afford a Consultant

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Why does Your Library need a Strategic Plan?

“If you don't know where you're going, you'll end up someplace else.” –Yogi Berra



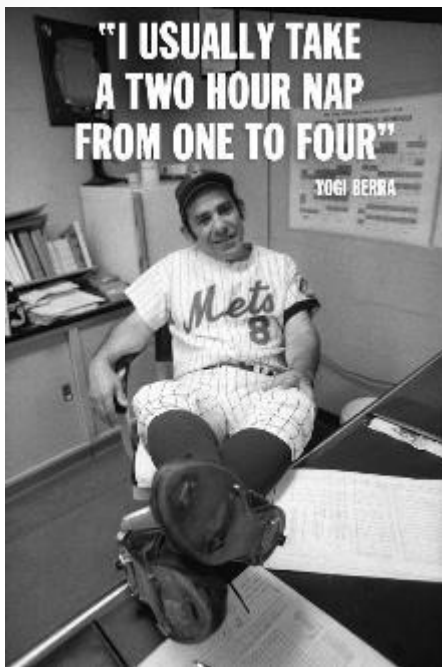
Libraries cannot keep doing what they have always done and expect to survive, let alone to flourish



Organization and Delegation: What does the Director need to do?

- Educate trustees
- Help formulate process
- Work with planning team/committee
- Help conduct research
- Provide examples of successful plans
- Help set goals, strategies, and priorities
- Collaborate to draft the plan
- Suggest action items to achieve goals
- Manage the library to support the plan





Organization and Delegation: What is the role of Trustees or Board of Directors?

- Establish how the work on the plan will get done
- Serve on an information and gathering committee
- Support community involvement
- Determine goals, objectives, and priorities
- Collaborate with director to draft plan
- Regularly evaluate progress towards completion

NJSL Strategic Planning Resources

http://www.njstatelib.org/services_for_libraries/consulting_services/library_trustees/strategic_planning/

Strategic Planning

Strategic Planning Slipsheet

The New Jersey State Library supports strategic planning as a management tool to determine a library's mission, vision, values, goals and objectives, roles and responsibilities, and to determine benchmarks and timelines that will shape the library's future. All libraries should have an updated strategic plan of three to five years, initiated by the Board of Trustees.

- **On Your Mark. Get Set. Start Planning!** – NJLA 2011 Presentation from the Ivy Group
- **Strategic Planning Workshop Presentation 1**
- **Strategic Planning Workshop Presentation 2**
- **Sample Format for Strategic Plans**
- **Sample Strategic Plan for a Small-Medium Sized Library**
- **Forums Facilitate Important Community Conversations**

Focus Groups

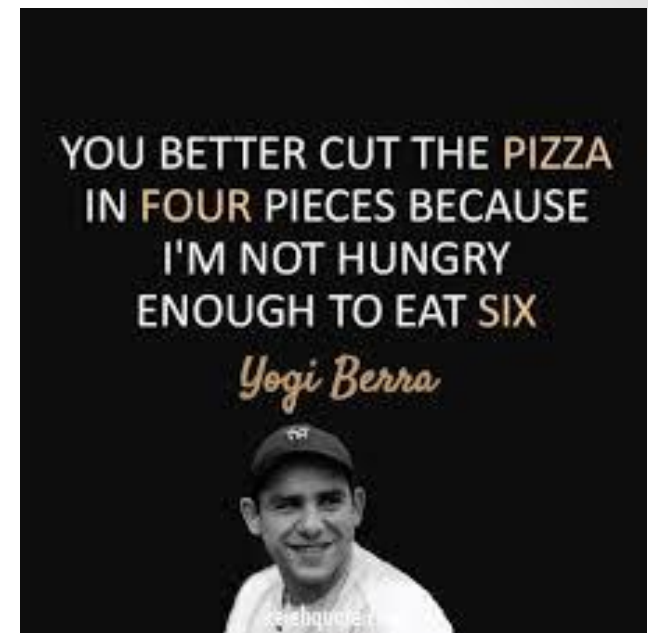
- **Organizing Focus Groups**
- **Focus Group Recruitment**
- **Organizing Leadership Interviews**
- **Community Leadership Interview Questions**
- **Sample Focus Group Discussion Guide**
- **Young Professionals Focus Group Guide**
- **Teen Focus Group Guide**
- **Seniors Focus Group Guide**
- **Ethic Focus Group Guide**

It's Not Your Library. It's Theirs

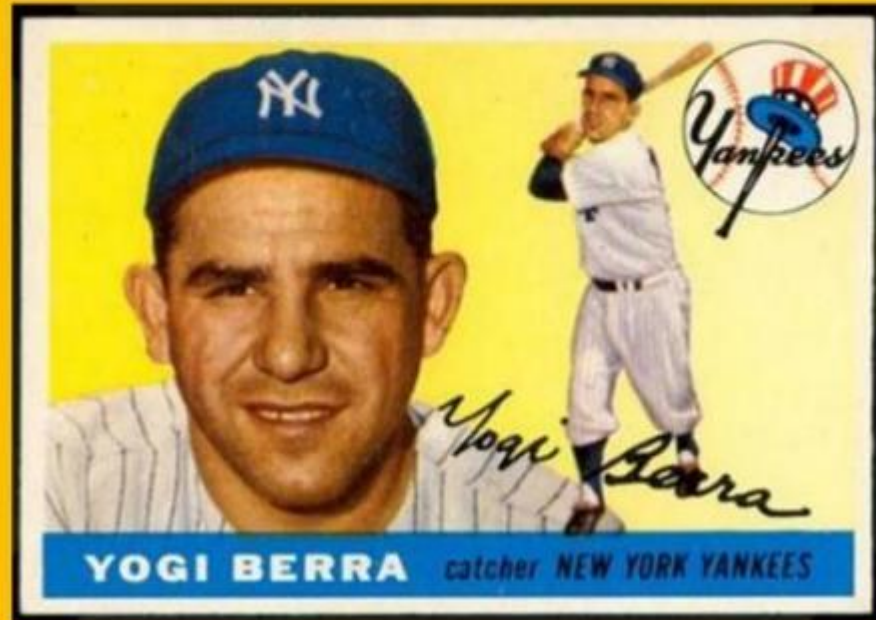


Basic Elements of a Strategic Plan

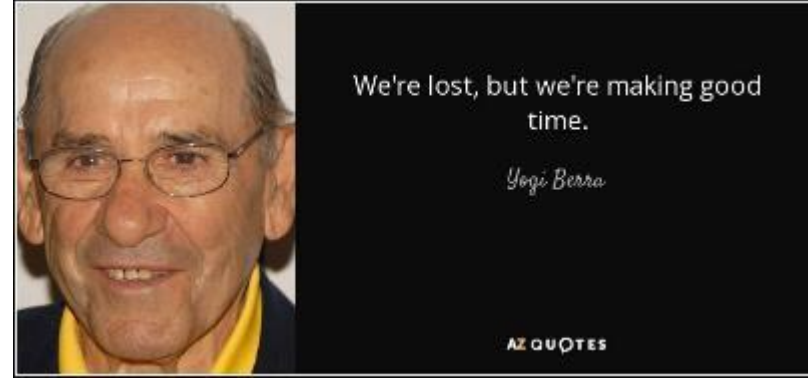
- Vision Statement
- Mission Statement
- Information Gathering and Analysis
- Goals and Strategies
- Budget/Anticipated Costs
- Timeline/Benchmarks
- Evaluation



**“It’s tough to make predictions,
especially about the future.”**



Vision Statement



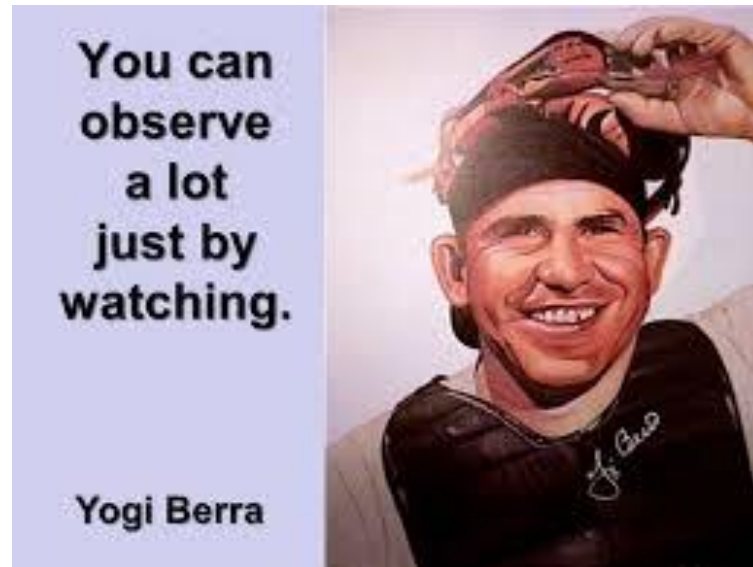
Our vision is to be the community's best source for inspiration, knowledge, and ideas. (Long Hill Township Public Library)

The South Orange Public Library will be the integral physical and virtual gateway by which our broad and diverse community may access information, congregate to freely exchange ideas, celebrate literacy and cultural growth in a leisurely yet lively atmosphere.

Mission Statement

- *The Any Town Public Library's mission is to inspire lifelong learning, advance knowledge, and foster community spirit in a welcoming environment.*
- *We link people to the world.*
- *Transforming Lives, Enriching Neighborhoods, and Preserving History*
- *We are the people's University, the center of learning for a diverse and inclusive community.*

Information Gathering & Analysis



Information Gathering and Analysis: Field Research

Stakeholders Data Gathering Methods:

- Mail Survey
- Online Survey
- Phone Survey
- Community Forums
- Targeted Forums (by seniors, teens, ethnic, young professionals, etc.)
- Staff survey

See NJSL website for resources for organizing focus groups and sample scripts:
http://www.njstatelib.org/services_for_libraries/consulting_services/library_trustees/strategic_planning/

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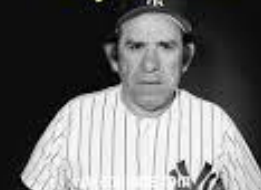
Focus Groups

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Goals and Strategies

IN THEORY THERE IS
NO DIFFERENCE BETWEEN
THEORY AND PRACTICE
IN PRACTICE THERE IS

Yogi Berra



Goals: Long term aims; what the community will receive

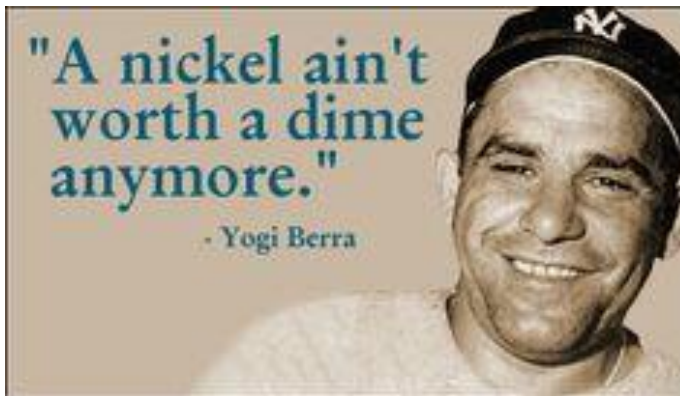
Goals are the general statements about the library's directions and aspirations. Select goals that may be achieved in a reasonable length of time, or that serve as interim steps along the way.

Strategies (or Objectives) are the “how” of moving towards goals.

Strategies are the steps to reach your over-arching goals. They set a framework for the activities the library is undertaking. They should be relatively short-range, practical and accompanied by an evaluation of progress.

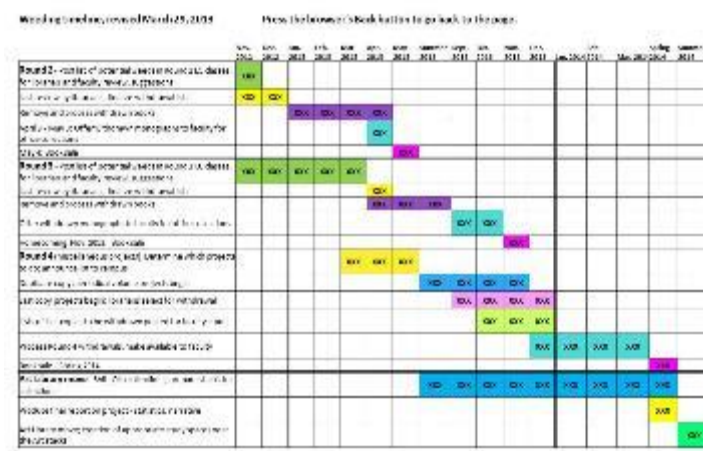
Budget and Anticipated Costs

- Estimate of costs for planned programs and activities
- Includes cost of personnel and other operations
- May also need a capital plan if saving for future building projects

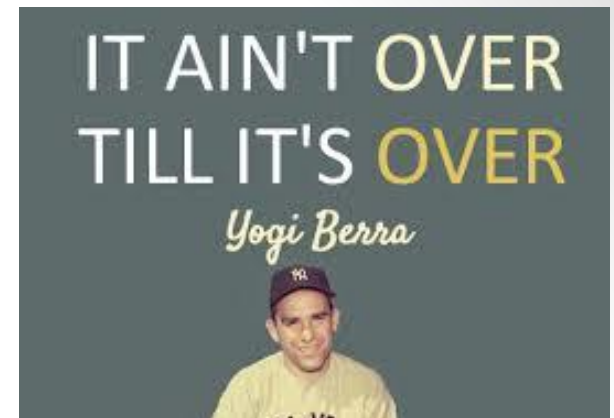


Timeline/Benchmarks

- Provisions must be made to review the plan, and check against current decisions and expenditures
- Always use your strategic plan as a check against the budget
- Map out a timeline outlining goals and strategies for each year of the plan
- Provides a point of reference against which things may be compared or assessed.

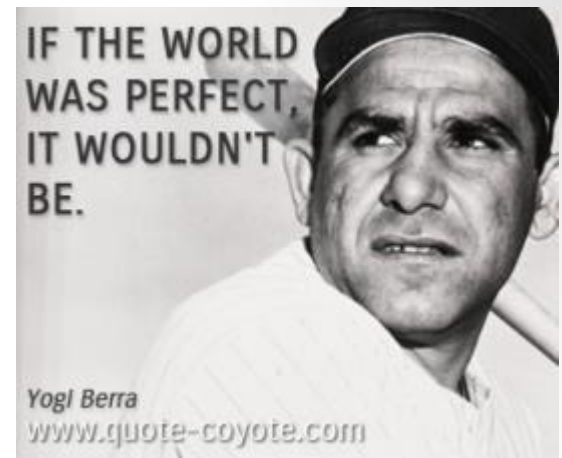


Final Review



1. Did you create the plan you intended to create?
2. Does your plan connect your mission to your vision?
3. Is your plan realistic?
4. Is the plan complete?
5. Is the plan clear?

Monitoring & Evaluation

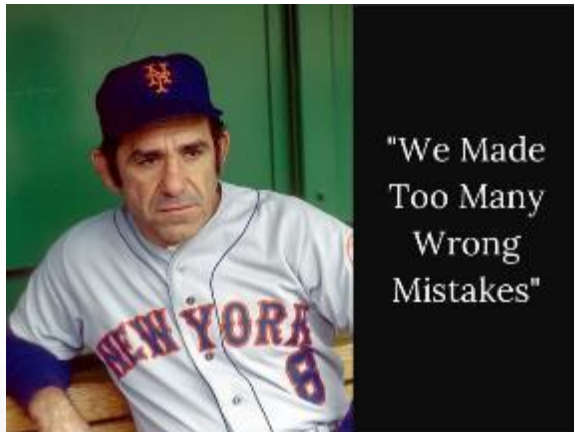


Finally, monitor and evaluate your progress. This provides timely and accurate data as you move forward.

- 1. Are goals and objectives being achieved or not? Are they still realistic?
- 2. Will the goals be achieved according to the timelines specified? If not, then why?
- 3. Should the deadlines for completion be changed?
- 4. Do you have adequate resources (money, equipment, facilities, training, etc.) to achieve the goals?
- 6. Should priorities be changed to put more focus on achieving the goals?

Frequency of Monitoring and Evaluation

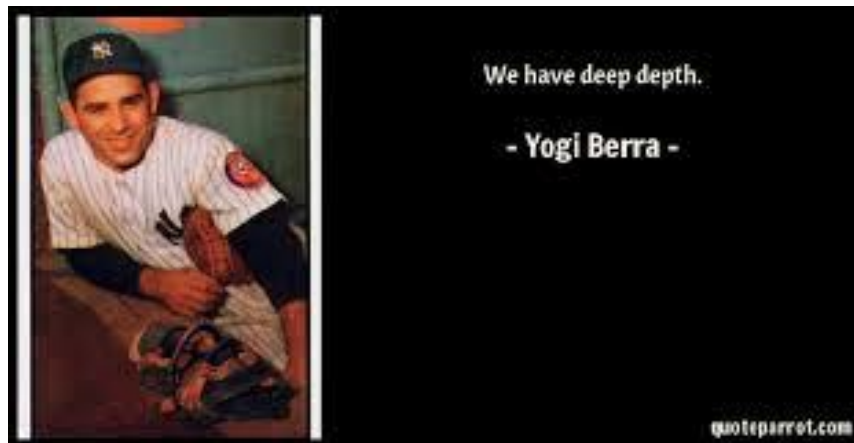
- The frequency of reviews depends on the nature of the library and the environment in which it's operating. Libraries experiencing rapid change from inside and/or outside the organization may want to monitor implementation of the plan at least on a monthly basis.
- Boards of directors should see status of implementation at least on a quarterly basis.
- Library directors should update status on a monthly basis.



Adaptive Planning



Promote Your Strategic Plan!



- Needs to be transparent
- Have trustees speak before elected officials, service groups, school board, PTO's, etc., to present overview of the plan and its potential for the community.
- The community will respond more positively to a library's plans when it sees a project or need as part of a planned sequence to improve services.
- Celebrate successes along the way!

Thank you!

Resources:

Strategic Planning for Results by Sandra Nelson
Publisher: ALA Editions, 2008.

NJSL Strategic Planning presentations, formats, templates:

http://www.njstatelib.org/services_for_libraries/consulting_services/library_trustees/

The Harwood Institute for Public Innovation

www.theharwoodinstitute.org

Aspen Institute: Re-envisioning the Future of Libraries

<http://csreports.aspeninstitute.org/Dialogue-on-Public-Libraries>

